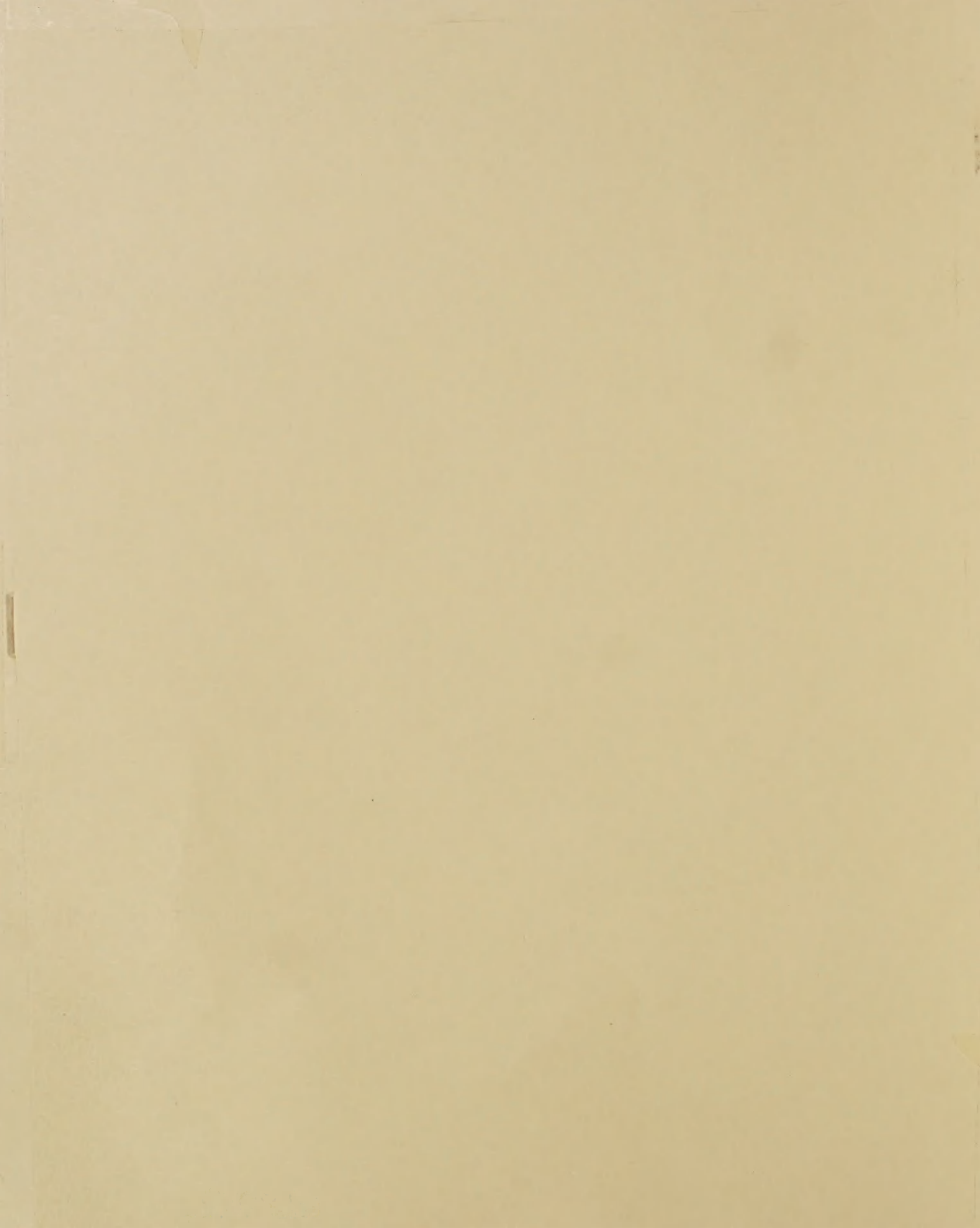


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# REPORT

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United States  
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Washington, D.C. 20250

WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

WR 47-83

WASHINGTON, Nov. 23--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

## GRAIN AND FEED

The CANADIAN Parliament recently passed legislation modifying the statutory freight rate system for prairie grains and oilseeds. The rate structure was established by the Crow's Nest Pass Act in 1897 and has remained virtually unchanged. The new legislation will provide railways with additional revenue to help improve facilities to expand Canada's export capacity significantly and help meet the Canadian goal of exporting 36 million tons of western grain and oilseeds by 1990/91. During 1982/83 (August-July), Canada exported just over 29 million tons of these commodities.

Grain freight rates paid by farmers, currently averaging about US\$4 per ton, are expected to double by 1985/86 and increase fivefold by 1990/91. Rates are scheduled to increase to about US\$4.70 per ton on Jan. 1, 1984, and US\$5.75 per ton on Aug. 1, 1984. A safety net will limit the extent to which freight rates can increase to 4 percent of the price of grain initially, rising to 10 percent by 1988.

In addition, the Canadian government has committed itself to paying the difference between compensatory rates and the Crow's Nest Pass rates, amounting to about C\$650 million (US\$527 million) annually. These payments will be made directly to the railways and future cost increases will be borne by both the farmers and the government. Total Canadian government expenditures for Crow's Nest Pass payments, branch-line rehabilitation and other related developmental programs are expected to reach C\$3.7 billion (US\$3 billion) by 1986. In turn, the railways are required to meet performance guarantees and implement long-term expenditure plans of C\$16.5 billion (about US\$13.4 billion) over the decade.

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AUSTRALIA has announced it will help build a 30,000-ton wheat silo complex and training facility in upper Egypt. Both Australian government aid and Australian Wheat Board commercial funds will be used to build the \$5 million complex. Egypt is one of Australia's largest wheat markets, with sales to date totaling 2 million tons for calendar 1984 shipment, tying 1982 record sales. The complex will be used by the Australian Wheat Board as a focal point for organizing training courses and advice on storage technology, mill hygiene, pest control, warehousing and milling and baking technology.

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YUGOSLAVIAN corn exports for 1983/84 are expected to reach a record 1.2 million tons, up 200,000 from the previous estimate and 100,000 above the 1982/83 export level. Exports will be up this year even though production is down 700,000 tons from last year's record production of 11.1 million tons. A shortage of hard currency and a decline in livestock feeding are principal factors in increasing corn exports. Yugoslavian corn will likely compete with U.S. corn in East and West European markets because of freight advantages.

# OILSEEDS AND PRODUCTS

Based on latest available data for the period beginning Jan. 1, 1983, with comparisons for the same months in 1982, net soybean and meal imports into 10 SELECTED MARKETS amounted to 14.7 million tons, soybean meal equivalent (SME), down 1 percent from the same period in 1982. Comparably net imports of soybeans and oil amounted to 1.73 million tons, about unchanged from the same period in 1982.

Combined exports of soybeans and products from the United States, Brazil and Argentina during December 1982 - September 1983 increased to 30.9 million tons meal equivalent, up 3.5 percent from the same 10 months a year earlier. Aggregate exports of soybeans and oil from three producer-exporter countries gained to 5.63 million tons, 2 percent above the same period in 1982.

Soybean and product trade data in terms of oil and SME for specified exporting and importing countries are as follows in million tons:

COUNTRY	PERIOD	TOTAL AS OIL 1982	TOTAL AS OIL 1983	TOTAL AS MEAL 1982	TOTAL AS MEAL 1983	1983 ANNUAL CHANGE AS OIL	1983 ANNUAL CHANGE AS MEAL
EXPORTS: Dec. 1982 thru							
U.S.	Sep. 83	4.32	4.19	20.99	20.81	-0.12	-0.18
BRAZIL	Sep. 83	0.77	1.02	6.98	8.16	0.25	1.17
ARGENTINA	Sep. 83	0.42	0.41	1.91	1.97	-0.01	0.05
TOTAL EXPORT		5.51	5.63	29.89	30.94	0.12	1.05
NET IMPORTS: Jan. 1983 thru							
BEL-LUX	Jun. 83	0.07	0.07	0.50	0.43	0.00	-0.07
DENMARK	Jul. 83	0.04	0.04	0.85	0.88	0.00	0.02
FRANCE	Aug. 83	0.05	0.06	2.65	2.64	0.01	-0.01
ITALY	Jul. 83	0.18	0.18	1.31	1.31	0.00	0.00
NETHERLANDS	Aug. 83	0.19	0.16	1.42	1.24	-0.03	-0.18
U.K.	Aug. 83	0.19	0.13	1.31	1.04	-0.05	-0.27
GER FED REP	Sep. 83	0.37	0.33	2.48	2.24	-0.03	-0.24
SPAIN	Aug. 83	0.01	0.05	1.41	1.43	0.04	0.03
PORTUGAL	Jun. 83	0.01	0.01	0.23	0.26	0.00	0.03
JAPAN	Sep. 83	0.62	0.68	2.67	3.18	0.06	0.51
SUB TOTAL		1.74	1.73	14.84	14.67	-0.01	-0.17
AVAILABLE FOR OTHER COUNTRIES							
		3.77	3.90	15.05	16.27	0.13	1.22

Compiled from unrounded data.

Subtracting aggregate net imports of the 10 specified countries from the combined exports of the major producing countries reveals that in the 1983 period export movements of soybeans to non-specified importing countries declined by 7 percent while movements of soybean oil increased by nearly 11 percent.

Movements of soybean meal to non-specified importing countries increased by 21 percent in the 1983 period. Expanded imports by the Soviet Union are believed to account for a sizable share of the expanded meal movements to non-specified countries. In terms of SME, non-specified country imports gained by 8 percent while oil equivalent imports were up 3 percent. Japan and Spain were the only specified countries showing expanded net imports in terms of both oil and meal.

#### DAIRY, LIVESTOCK AND POULTRY

Total meat production in SELECTED COUNTRIES is estimated to be up about 1.6 million tons in 1983 due principally to growth in the pork sector. Current forecasts for 1984 indicate a more rapid increase in poultry meat output, slower growth in pork production, and a small decline in beef production. Major uncertainties that could affect production of meat during 1984 include the impact of higher feed prices and the response of meat demand to improved economic conditions. Data are as follows in 1,000 tons:

	Total Meat Production		
	1982	1983	1984
Beef and veal	40.3	40.4	40.1
Pork	36.3	37.4	37.7
Sheep and goat meat	4.5	4.6	4.7
Total red meat	81.1	82.4	82.5
Poultry	22.2	22.5	23.1
Grand total	103.3	104.9	105.6

Total beef production is forecast to decline in 1984 largely in reaction to continuing low cattle prices and the impact of past droughts. The 1983 Australian beef production estimate of 1.42 million tons, though below 1982, is larger than previously estimated because of increased slaughter attributed to higher export prices and continuing producer cash flow difficulties. Beef and veal production in 1984 is projected to fall to 1.27 million tons. Though down at the start of the year, Australian cattle numbers may begin to stabilize during 1984.

New Zealand's projected beef and veal production for 1984 is below earlier estimates as a result of improved grazing, which has relieved culling pressures following the two-year drought on the east coast of the North Island.

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# Cattle Numbers and Beef Production

	Beginning Cattle Inventory			Beef and Veal Production		
	1982	1983	1984	1982	1983	1984
	-----Million Head-----			--Million Metric Tons---		
United States	115.6	115.2	115.0	10.43	10.71	10.30
Canada	12.1	11.6	11.3	1.03	1.05	1.03
EC-10	77.9	78.8	78.9	6.60	6.79	6.82
Eastern Europe	37.8	37.3	37.2	2.48	2.31	2.33
Soviet Union	115.9	117.2	119.0	6.60	6.90	7.10
Argentina	57.9	58.9	60.3	2.58	2.32	2.40
Uruguay	10.9	10.3	9.4	0.38	0.42	0.38
Australia	24.6	22.5	21.7	1.68	1.42	1.27
New Zealand	8.0	7.9	7.5	0.52	0.52	0.47
Japan	4.5	4.6	4.7	0.48	0.49	0.49
Total	939.3	937.9	939.2	40.34	40.35	40.08
(49 countries)						

In the Soviet Union, better feed supplies and upward revisions in carcass weights have led to higher beef production estimates for 1983 and 1984. In Argentina, both 1983 and 1984 beef production estimates have been increased from earlier projections. The increase projected for 1984 is based on producer expectations that cattle prices will keep up with inflation.

Beef production in Japan during 1984 is estimated above previous projections because of an expected increase in dairy heifer slaughter attributed to shortages of winter feeds. Beef and veal production estimates for Canada for both 1983 and 1984 have been increased from previous estimates because of heavier carcass weights.

Soviet pork production estimates are up in both 1983 and 1984 as a result of improved feed supplies and increased slaughter weights. Brazilian pork production is down in both years. Higher production costs, combined with depressed consumer demand for Brazilian pork have caused a rise in sow slaughter which is expected to result in a reduction in beginning 1984 hog numbers.

## Hog Numbers and Pork Production

	Beginning Hog Inventory			Pork Production		
	1982	1983	1984	1982	1983	1984
	-----Million Head-----			--Million Metric Tons---		
United States	58.7	53.9	56.5	6.45	6.84	6.72
Canada	10.0	9.9	9.8	0.83	0.86	0.85
Mexico	16.5	16.0	14.0	1.20	1.08	1.07
EC-10	78.3	79.2	79.7	9.42	9.57	9.60
Eastern Europe	72.3	70.0	70.3	6.49	6.37	6.43
Japan	10.0	10.3	10.4	1.43	1.45	1.48
Soviet Union	73.3	76.7	79.5	5.30	5.70	6.00
Brazil	33.5	33.5	33.0	0.97	0.95	0.94
Total	401.9	402.4	408.1	36.34	37.38	37.73
(49 countries)						

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Soviet beginning year 1984 sheep numbers and meat production projections for both 1983 and 1984 have been revised upward reflecting an improved feed situation. In Australia, sheep numbers will be up at the beginning of 1984 but the faster growth projected earlier has not materialized. The slower recovery is expected to limit the increase in 1984 meat production to around 8 percent. In New Zealand, 1984 sheep numbers, which previously were forecast to rise slightly, are now forecast lower, the first decline in 7 years. The unexpected drop may have been caused by a regional drought, now ended, that affected a major production area.

	Sheep Numbers and Meat Production			Sheep and Goat Meat Production		
	Beginning Sheep Inventory			1982 1983 1984		
	1982	1983	1984	1982	1983	1984
	-----Million Head-----			-----Thousand Tons-----		
Soviet Union	142.4	142.2	144.0	800	900	950
Australia	138.0	133.2	134.0	554	485	522
New Zealand	69.9	70.3	69.8	621	655	620
Total	662.5	657.2	659.1	4,526	4,639	4,680
(31 countries)						

Total poultry meat production in the 36 countries reviewed is forecast at 22.5 million tons in 1983 and 23.1 million tons in 1984, increases of 1.4 and 2.4 percent, respectively. Broilers, the major part of total poultry meat production, accounted for only about a third of the 1983 increase, but in 1984 are forecast to account for more than three-fourths of the gain. Turkey production may contract slightly in 1984. With lower production in the United States, the European Community and Brazil, total egg production barely increased in 1983, but a more normal 1 percent increase is expected in 1984.

Poultry Meat and Egg Production  
(1,000 Tons and Billion Units)

	Total Poultry Meat			Eggs		
	1982	1983	1984	1982	1983	1984
United States	7,046	7,240	7,380	69.6	67.9	67.5
Mexico	564	506	516	10.0	9.8	9.9
Brazil	1,591	1,580	1,590	10.2	9.0	9.0
EC-10	4,368	4,234	4,321	72.2	71.1	71.2
Spain	853	820	845	12.3	12.4	12.2
USSR	2,400	2,600	2,800	72.4	75.5	80.0
Japan	1,209	1,279	1,307	34.3	35.0	35.0
Total	22,195	22,524	23,054	345.2	346.0	350.7
(36 countries)						

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Broiler and Turkey Meat Production  
(1,000 Tons)

	Broiler			Turkey Meat		
	1982	1983	1984	1982	1983	1984
United States	5,523	5,689	5,836	1,144	1,192	1,190
Mexico	455	400	410	33	30	30
Brazil	1,500	1,490	1,500	NS	NS	NS
EC-10	3,018	2,838	2,925	133	140	135
Spain	783	750	775	19	20	21
USSR	675	725	775	47	49	50
Total (36 countries)	15,200	15,268	15,668	2,116	2,198	2,209

NS - Not significant.

Countries with significant changes in poultry meat production forecasts since the previous release include Venezuela, Brazil and the EC. In Brazil and the EC, demand in both domestic and foreign markets has continued to be weak, rather than strengthening as earlier forecast. Thus, forecast production in both 1983 and 1984 has been lowered. In Venezuela, rapid production increases during the past year put that country above its self-sufficiency level. Since exports are difficult and domestic demand continues to be weak, a sharp downward adjustment in 1984 production seems likely.

Changes in egg production forecasts occurred mainly in the USSR and Brazil. In the USSR, more plentiful feed supplies appear to have stimulated unexpected increases in productivity. Forecast Brazilian production is down in both 1983 and 1984 as producers have reacted rather sharply to low egg prices and higher feed prices.

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NEW ZEALAND's beef and veal production for 1982/83 reached 522,000 tons, about the same as the 1981/82 level. Cow and calf slaughter in 1982/83 was below year-earlier levels but steer, heifer and young bull slaughter was up 4 percent. Sheep and lamb meat production reached 655,000 tons, up 5.5 percent from 1981/82 due to a larger lamb crop and an increase in sheep slaughter. For 1984, both beef and veal and sheep meat production are expected to fall--beef and veal production over 10 percent to 467,000 tons, and sheep meat production 5 percent to 620,000 tons.

For the two years ending October 1983, drought conditions prevailed on the east coast of North Island. This area contains over 20 percent of New Zealand's beef cattle and lesser amounts of sheep and dairy cows. Due in part to the drought, June 30, 1983, cattle numbers were down over 5 percent to 7.49 million head. Beef cows were down 8 percent to 1.45 million while dairy cows were up slightly to 2.02 million. Sheep numbers were down slightly to 69.8 million, the first drop in sheep numbers in 7 years.

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## COTTON AND FIBERS

In the UNITED STATES, cotton sales have been boosted by continued substantial sales to Europe and Asia because of the Soviet Union's inability to provide cotton during 1983 and also by reduced competition from Pakistan's crop, which has been affected by weather and insect damage. Furthermore, lower production in South America has resulted in unexpected demand for U.S. cotton. The USDA has increased the U.S. cotton export forecast by 300,000 bales to 5.6 million. This increases the forecast U.S. share of the world's cotton trade by 2 percentage points to 30 percent.

## TOBACCO

CZECHOSLOVAKIA will produce an estimated 22.6 billion cigarettes in 1983, compared to 23 billion in 1982. The decline in cigarette production largely reflects a recent decline in domestic demand as a result of a large increase in prices and a continuing campaign against smoking. Prices of cigarettes and tobacco products were raised in January 1982 by an average of 30 percent. Because of the continued campaign against smoking, the tobacco industry has been turning out more filter-tipped cigarettes, an estimated 90 percent of the total in 1983. The decline in cigarette production in 1984 will probably be halted and output is forecast at 22.6 billion pieces.

Over the past several years, leaf tobacco imports have shown an erratic trend. Imports in recent years have ranged between 16,000 and 29,000 tons. In some years, more tobacco is bought abroad than needed, while in other years the opposite is true. Imports in 1983 are estimated at 21,000 tons, compared with 19,000 tons in 1982. Most of the imports are oriental types from Southern Europe. Some Virginia tobacco is also imported from African origins.

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WORLD 1983 total unmanufactured tobacco production is now estimated at 5.94 million tons (farm sales weight basis), down 2 percent from the May estimate and 14 percent below last year's record 6.88-million-ton crop. The two major tobacco producing countries, China and the United States, had sharply reduced crops. With substantially reduced area, the 1.5-million-ton Chinese crop was down 31 percent from the record 2.18 million harvested in 1982. Reflecting both reduced area and lower yields, the United States harvested 628,000 tons, 30 percent below last year's output of 899,000 tons and the smallest crop since 1941. Other major tobacco producing countries, including Greece, India, Mexico, Poland and the Republic of Korea, also had substantially reduced crops in 1983. Sizable production increases were posted for other major producing countries, including Argentina, Canada, Colombia, Indonesia, Thailand, Malawi, Turkey, Yugoslavia and Zimbabwe.

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World flue-cured tobacco production in 1983 was down 16 percent from last year's crop. Leading the decline in production was the 30-percent decrease in the Chinese crop and the 19-percent decrease in the U.S. crop. Production was down 6 percent in Brazil and Japan, and 22 percent in the Republic of Korea. India, however, produced a record 160,000-ton flue-cured crop in 1983, up 27 percent; Canadian output was up 56 percent, rebounding from the frost-damaged crop of last year. Flue-cured crops in Thailand and Zimbabwe also were up in 1983.

The 1983 world burley crop was down 10 percent from last year's harvest, despite an 8-percent increase in area. Burley area and yields in the United States, the leading producer, were down 15 and 35 percent, respectively, with production down 45 percent. Burley crops in Mexico and the Republic of Korea also were down from last year. Substantial area expansions occurred in Malawi and Brazil, with production up 61 and 15 percent, respectively, from last year's harvest.

World oriental tobacco production was down 2 percent from last year. The USSR produced a record 305,000 tons, up 3,000 tons from last year. Turkey's crop was up 3 percent to 220,000 tons. However, an especially dry growing season in a large portion of southeastern Europe led to substantial production declines in major oriental leaf producing countries including Bulgaria, Greece, Italy, Romania and Yugoslavia.

World dark air/sun-cured tobacco production was down 13 percent from 1982. Sharply reduced crops were harvested in China, France, India and Poland. World light air-cured production in 1983 was 21 percent below last year, with the 100,000-ton Chinese crop down 40 percent. World dark air-cured cigar leaf production was down 5 percent from last year. Unseasonably wet weather caused substantial damage to Cuba's cigar leaf crop. Dark fire-cured tobacco production in 1983 was down 17 percent from last year's harvest. Production was up in Malawi and India, but down in Argentina, Italy, Poland, the United States and Tanzania.

World unmanufactured tobacco production for 1982 and 1983, by leaf type, is as follows in 1,000 tons):

Leaf Type	Revised 1982	Estimated 1983
Flue-Cured	3,568	2,991
Burley	752	628
Oriental	908	892
Dark air/sun-cured	1,072	936
Light air-cured	346	275
Dark air-cured, cigar	178	168
Dark fire-cured	55	46
Total	6,879	5,936

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## WOOD AND WOOD PRODUCTS

Approximately 7.1 million hectares, or 29 percent, of WEST GERMANY's total land area is forest. The large, managed forests are located in central and southern Germany. The only virgin woodlands are in the southeast region of Bavaria. A breakout by species indicates that 42.5 percent of Germany's standing timber is of spruce and fir, 27 percent pine and larch, 7.5 percent oak and 23 percent beech and miscellaneous hardwoods.

The area specifically designated as forestland has been steadily expanding at an annual rate of about one-tenth of 1 percent per year. Afforestation has occurred primarily on agricultural land of marginal productivity and has amounted to 1,500-2,000 hectares annually over the past 5 years. Reforestation measures are expected to accelerate in southern Germany, where nearly all the firs and approximately 80 percent of the spruce trees have been damaged by disease caused by severe air pollution.

West Germany is an important producer of timber, 50-60 percent of which is sawlogs and veneer. Harvesting of logs and other wood fell sharply in 1982 due to the general decline in the German economy that resulted in fewer housing starts. The German economy is presently experiencing a moderate upswing, and, as a result, the production of lumber and wood products is increasing. This trend is expected to continue into 1984. Estimated production of German roundwood and selected wood products is as follows in 1,000 cubic meters:

	1981	1982	1983 1/
Roundwood	29,439	29,001	27,090
Softwood Logs	13,185	11,796	12,300
Hardwood Logs	3,307	2,849	2,940
Wood Chips	1,142	1,246	1,250
Softwood Lumber	7,530	7,038	7,500
Hardwood Lumber	1,740	1,557	1,750
Railroad Ties	300	256	250
Veneer	390	358	390
Plywood	354	331	350
Particleboard	5,741	5,486	5,800

1/ Preliminary.

West Germany imports a substantial volume of logs, sawnwood and panel products to satisfy domestic demand for high-quality materials. The United States is a major supplier of hardwood logs, oak lumber, veneer and plywood. West German imports of wood and wood products are estimated as follows in 1,000 cubic meters (square meters for fiberboard):

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	1981	1982	1983 1/
Roundwood	3,429	2,898	2,850
Softwood Logs	794	909	950
Hardwood Logs	309	281	320
Wood Chips	188	326	320
Softwood Lumber	3,754	3,891	4,150
Temperate Hardwood Lumber	284	270	290
Tropical Hardwood Lumber	458	446	550
Railroad Ties	49	41	60
Veneer	138	133	140
Plywood	472	438	600
Particleboard	871	743	1,000
Fiberboard (m2)	46,760	44,376	49,100

1/ Forecast.

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Selected International Prices

Item	: Nov. 22, 1983	: Change from	: A year
	:	: previous week	: ago
ROTTERDAM PRICES 1/	\$ per MT	\$ per bu.	\$ per MT
Wheat:			\$ per MT
Canadian No. 1 CWRS-13.5%.	200.00	5.44	-3.00
U.S. No. 2 DNS/NS: 14%...	185.00	5.03	-2.50
U.S. No. 2 S.R.W.....	152.00	4.14	-4.50
U.S. No. 3 H.A.D.....	200.00	5.44	-8.00
Canadian No. 1 A: Durum..	206.00	5.61	-6.00
Feed grains:			
U.S. No. 3 Yellow Corn....	157.00	3.99	-4.00
Soybeans and meal:			
U.S. No. 2 Yellow.....	298.75	8.13	-28.75
Brazil 47/48% SoyaPellets 2/	273.00	--	-18.00
U.S. 44% Soybean Meal.....	251.00	--	-15.00
U.S. FARM PRICES 3/			
Wheat.....	124.56	3.39	-3.31
Barley.....	90.02	1.96	-12.40
Corn.....	127.55	3.24	-2.76
Sorghum.....	106.48	4.83 4/	-3.09
Broilers 5/.....	1296.08	--	+34.39
EC IMPORT LEVIES			
Wheat 6/.....	75.60	2.06	+1.10
Barley.....	49.20	1.07	-1.00
Corn.....	40.90	1.04	-1.00
Sorghum.....	57.00	1.45	-1.00
Broilers 7/.....	N.Q.	--	-- 8/
EC INTERVENTION PRICES 10/			
Common wheat(feed quality)	167.80	4.57	-2.20
Bread wheat (min. quality)	183.85	5.00	-2.45
Barley and all			
other feed grains.....	167.80	--	-2.20
Broilers 9/.....	N.Q.	--	--
EC EXPORT RESTITUTIONS (subsidies)			
Wheat 10/.....	40.40	1.10	+5.50
Barley.....	N.A.	--	--
Broilers 7/.....	N.Q.	--	-- 10/

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine. 3/ Based on selected major markets and adjusted to reflect farm prices more closely. 4/ Hundredweight (CWT). 5/ Twelve-city average, wholesale weighted average. 6/ Durum has a special levy. 7/ EC category--70 percent whole chicken. 8/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 14 Sept 83 from 22.50 ECU/100 bag set in Feb 1983. 9/ F.o.b. price for R.T.C. broilers at West German border. 10/ Corrective amount in ECU's: Dec. zero, Jan. -3, Feb. -5, Mar. -6. N.Q.=Not quoted. N.A.=None authorized. Note: Basis December delivery.

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